HOUSING MARKET INFORMATION

SENIORS' HOUSING REPORT
Manitoba

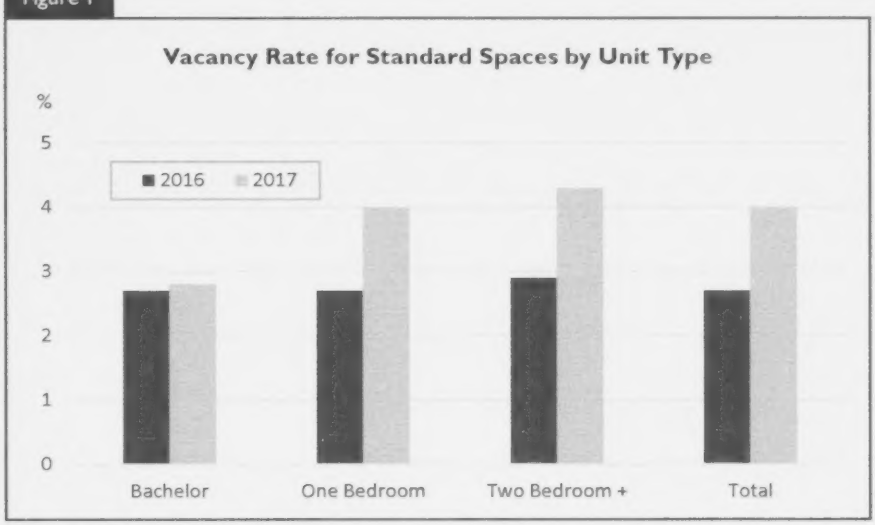
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2017

Highlights

- The overall vacancy rate for standard spaces in retirement homes across Manitoba increased to 4.0% in 2017 from 2.7% in 2016.
- In the Winnipeg CMA, vacancy rates for standard spaces were lower than the provincial average at 2.5% in 2017.
- The overall average rent for a standard retirement space in Manitoba was $2,686 in 2017 compared to $2,580 one year earlier. However, the majority of spaces rented for $3,000 or more.
- Demand for seniors housing in Manitoba remained strong and increased 5.2% from 4,515 residents in 2016 to 4,751 in 2017.
- There were 42 facilities surveyed in Manitoba in 2017, containing a total of 4,395 spaces.

Figure 1



Source: CMHC

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Previous Seniors' Housing Reports were mainly descriptive. In an effort to produce a more meaningful report, the text in the report has been shortened to focus only on key highlights while continuing to give you the data tables you have always received. An optional spotlight section focusing on topics related to the Seniors' Housing Market is included in some reports.

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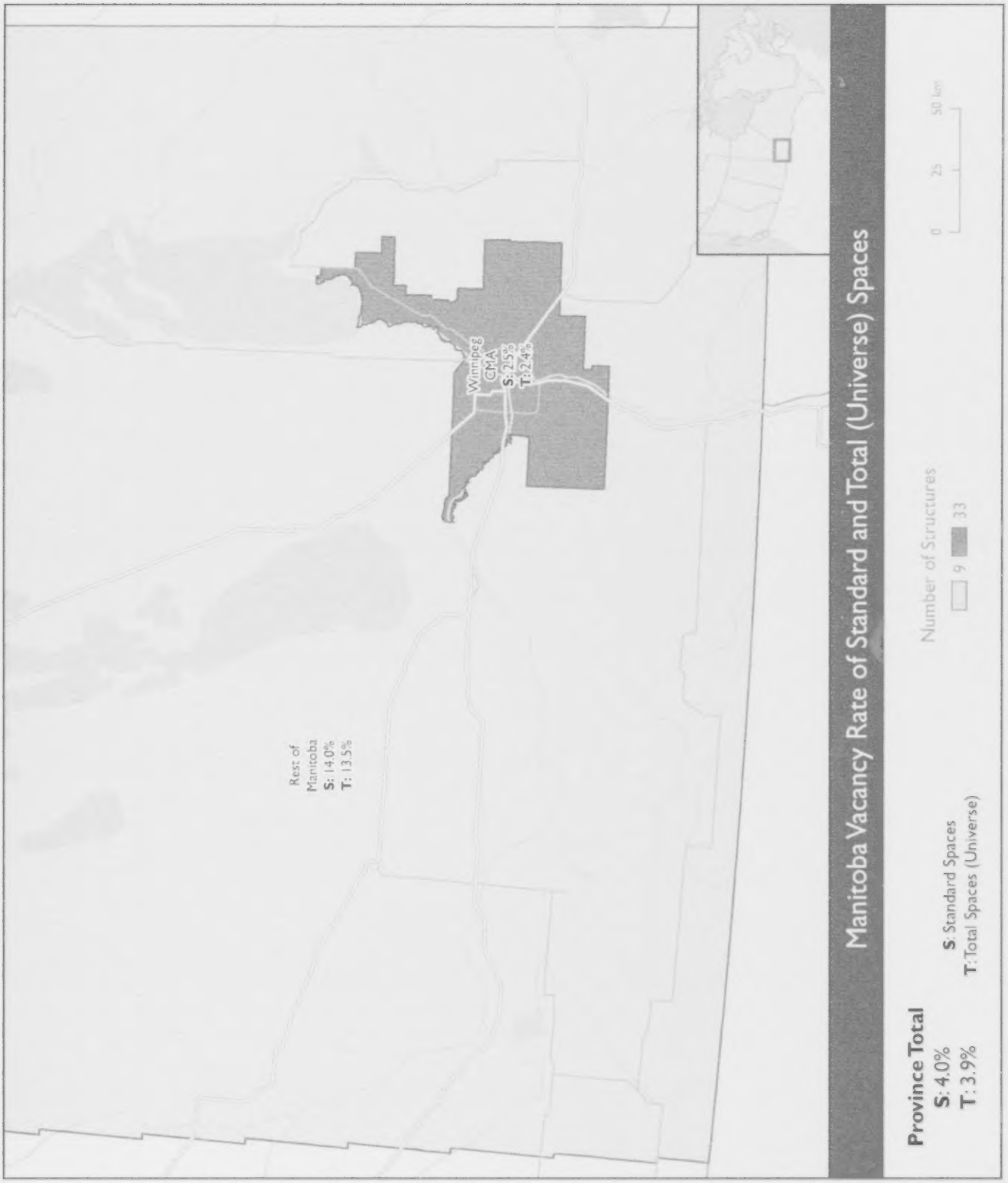
Manitoba Vacancy Rate of Standard and Total (Universe) Spaces
Province Total
S: 4.0%
T: 3.9%
S: Standard Spaces
T: Total Spaces (Universe)
Number of Structures
9
33
0
25
50 km
Winnipeg CMA
S: 2.5%
T: 2.4%
Rest of Manitoba
S: 14.0%
T: 13.5%

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1.1 Vacancy Rate (%) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Winnipeg CMA	**	**	3.7	2.5	2.1	2.3	2.1	3.1	2.2	2.5
Rest of Manitoba	**	**	**	**	8.5	16.2	**	**	7.6	14.0
Manitoba	**	**	**2.7**	**2.8**	**2.7**	**4.0**	**2.9**	**4.3**	**2.7**	**4.0**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rate (%) of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 - $2,999		$3,000 and More	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Winnipeg CMA	**	**	1.4	0.7	1.4	0.9	4.0	2.4	1.7	4.7
Rest of Manitoba	**	**	**	**	**	**	**	3.3	**	**
Manitoba	**2.4**	**1.5**	**1.2**	**0.6**	**2.9**	**2.1**	**3.8**	**2.6**	**1.6**	**8.0**

The following units are excluded from the table above: non-market/subsidy units, respite units, and units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:
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1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Manitoba

Province	Total Number of Spaces	Overall Vacancy Rate (%)		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2016	2017				
Winnipeg CMA	3,800	2.1	2.4	33	4,142		
Rest of Manitoba	595	7.4	13.5	9	610		
Manitoba	**4,395**	**2.7**	**3.9**	**42**	**4,751**	**88,300**	**5.4**

[1] Source: Statistics Canada. Table 052-0005 - Projected population, by projection scenario , age and sex, as of July 1, Canada, provinces and territories, annual (persons),CANSIM

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

2.1 Universe of Total Spaces by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Winnipeg CMA	417	2,655	728	3,800
Rest of Manitoba	91	399	105	595
Manitoba	**508**	**3,054**	**833**	**4,395**

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2.2 Universe by Unit Type
Manitoba

Province	Semi Private / Bachelor	One Bedroom	Two Bedroom +	Total
Winnipeg CMA	**417**	**2,655**	**728**	**3,800**
Standard Spaces	162	2,541	718	3,421
Non-Standard Spaces	192	-	-	192
Unknown Spaces	63	114	10	187
Rest of Manitoba	**91**	**399**	**105**	**595**
Standard Spaces	55	283	89	427
Non-Standard Spaces	1	48	-	49
Unknown Spaces	35	68	16	119
Manitoba	**508**	**3,054**	**833**	**4,395**
Standard Spaces	217	2,824	807	3,848
Non-Standard Spaces	193	48	-	241
Unknown Spaces	98	182	26	306

2.3 Universe of Standard Spaces by Rent Range ($)
Manitoba

Province	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 - $2,999	$3,000 and More
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Winnipeg CMA	2.4	8.0	31.3	25.9	32.3
Rest of Manitoba	8.6	6.6	12.5	41.0	31.3
Manitoba	**3.2**	**7.8**	**28.8**	**27.9**	**32.2**

[1] % is based on those spaces where the rent is known.

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size Manitoba

Province	Meals				On-Site Medical Services	On-Site Nursing Services[2]	24-Hour Call Bell	Pharmacy
	Optional	# of Meals Included in Rent						
		1	2	3				
Winnipeg CMA	**0.0**	**3.2**	**61.3**	**	**19.4**	**	**51.6**	**9.7**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	0.0	4.2	58.3	**	25.0	20.8	62.5	**
Rest of Manitoba	**33.3**	**11.1**	**	**	**33.3**	**	**	**
10 - 49	**	**	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**	**	**
90 or more	**	**	**	**	**	**	**	**
Manitoba	**7.1**	**4.9**	**54.1**	**	**22.4**	**	**	**
10 - 49	**	**	**	**	**	16.3	**	**
50 - 89	**	13.7	86.3	**	**	**	**	**
90 or more	0.0	3.7	**	**	**	**	**	**

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] On-site nursing services include RN, RPN or LPN.

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size Manitoba

Province	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Winnipeg CMA	**58.1**	**0.0**	**25.8**	**48.4**	**87.1**	**71.0**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	66.7	0.0	29.2	58.3	100.0	87.5
Rest of Manitoba	**33.3**	**	**	**	**55.6**	**44.4**
10 - 49	**	**	**	**	**	**
50 - 89	**	**	**	**	**	**
90 or more	**	**	**	**	**	**
Manitoba	**52.8**	**0.0**	**	**	**80.3**	**65.3**
10 - 49	**	**	**	16.3	16.3	16.3
50 - 89	**	**	**	**	**	**
90 or more	70.2	0.0	**	**	100.0	88.8

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

The following letter codes are used to indicate the reliability of the estimates:

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3.1 Average Rent ($) of Standard Spaces by Unit Type
Manitoba

Province	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Winnipeg CMA	**	**	2,061	2,120	2,491	2,597	3,054	3,154	2,591	2,691
Rest of Manitoba	**	**	**	**	2,550	2,672	**	2,952	2,488	2,647
Manitoba	**	**	**2,107**	**2,101**	**2,497**	**2,606**	**3,002**	**3,130**	**2,580**	**2,686**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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01 Building Structure Makeup (%) Manitoba		
Province	**Concrete Frame**	**Wood Frame**
Manitoba	**26.2**	**73.8**

02 Ancillary Services, Cable and Telephone and Optional Costs (% of residences) Manitoba					
Centre	**Services**	**Included in Rent (%)**	**Tenant Arrange (%)**	**Optional (%)**	**Average Cost if Optional ($)**
Winnipeg CMA	Cable	36.4	42.4	18.2	**
	Telephone	3.0	78.8	18.2	**
Rest of Manitoba	Cable	22.2	55.6	11.1	**
	Telephone	**	77.8	11.1	**
Total	**Cable**	**33.3**	**45.2**	**16.7**	**
	Telephone	**2.4**	**78.6**	**16.7**	**

03 Vacancy Rates (%) of Standard Spaces by Date Residence Opened Manitoba				
Province	**Before 1990**	**1990 - 1999**	**2000 or Later**	**Total**
Manitoba	**	**	**4.1**	**4.0**

The following letter codes are used to indicate the reliability of the estimates:
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O3.2 Vacancy Rates (%) of Total Spaces[1] by Unit Type Manitoba

Centre	Semi Private		Bachelor		One Bedroom		Two Bedroom +		Total	
	2016	2017	2016	2017	2016	2017	2016	2017	2016	2017
Winnipeg CMA	**	**	2.5	1.7	2.1	2.3	2.1	3.1	2.1	2.4
Rest of Manitoba	**	**	**	**	8.5	15.3	**	**	7.4	13.5
Manitoba	**	**	**2.1**	**2.0**	**2.7**	**4.1**	**2.9**	**4.3**	**2.7**	**3.9**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

O3.3 Universe of Total Spaces[1] by Size of Residence Manitoba

Centre	< 50 Spaces		50 - 99 Spaces		100 + Spaces		Median
	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Number of Residences	Total Spaces	Residence Size
Winnipeg CMA	3	97	8	636	22	3,067	116
Rest of Manitoba	4	84	2	148	3	363	66
Manitoba	**7**	**181**	**10**	**784**	**25**	**3,430**	**112**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

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O3.4 Vacancy Rate (%) and Universe of Total Spaces[1] by Date Residence Opened
Manitoba

Centre	Before 2001		2001 or Later		Total	
	Vacancy Rate	Universe	Vacancy Rate	Universe	Vacancy Rate	Universe
Winnipeg CMA	3.4	957	1.9	2,843	2.3	3,800
Rest of Manitoba	**	170	13.9	425	10.3	595
Manitoba	**3.1**	**1,127**	**3.5**	**3,268**	**3.4**	**4,395**

[1]Information above includes all heavy care units - both those heavy care units located within seniors' complexes with independent living suites and also those located in residences which offer heavy care to 100% of units (such as nursing homes, long term care homes, extended care homes and multi-level care homes)

O4 Average Rents ($) of Standard Spaces by Date Residence Opened
Manitoba

Province		Before 1990	1990 - 1999	2000 or Later	Total
Manitoba	Semi-Private	**	**	**	**
	Bachelor	**	**	2,625	2,101
	One Bedroom	**	**	2,617	2,606
	Two Bedroom +	**	**	3,080	3,130
	Total	**	**	2,728	2,686

The following letter codes are used to indicate the reliability of the estimates:
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O5 Number of Residents, Number of Residents Living Alone and Number of Residents in Heavy Care Units
Manitoba

Centre	2016	2017
Winnipeg CMA		
Total number of residents	4,073	4,142
Number of residents living alone	3,160	3,275
Total number of couples	400	433
Number of residents in heavy care units	**	**
Rest of Manitoba		
Total number of residents	442	610
Number of residents living alone	338	**
Total number of couples	52	95
Number of residents in heavy care units	**	**
Manitoba		
Total number of residents	4,515	4,751
Number of residents living alone	3,498	3,694
Total number of couples	452	528
Number of residents in heavy care units	**	**

The following letter codes are used to indicate the reliability of the estimates:
a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)
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Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe.

To be eligible for inclusion in the survey results, a residence must:

- ✓ have at least one unit that is not subsidized (in the Atlantic provinces, Quebec and Ontario);
- ✓ have been in operation for at least one year (for example, it must have started operation before January 2015 to be included in the 2016 survey);
- ✓ have at least 10 rental units (in Quebec, Ontario and the Prairies) or 5 rental units (in the Atlantic provinces and B.C.);
- ✓ offer an on-site meal plan;
- ✓ not mandate high levels of health care (defined as 1.5 hours or more of care per day) to all of its residents; nursing homes and long-term care homes are examples of residences that were not included in the survey;
- ✓ offer rental units; life lease units and owner-occupied units are excluded from this survey; and
- ✓ have at least 50 per cent of its residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey; therefore, all seniors' residences in Canada meeting these criteria are to be part of this survey. The survey universe in Quebec may include private residences that do not meet the conditions for obtaining a certificate of compliance.

Survey data were obtained through a combination of telephone interviews and fax and e-mail responses. Information was obtained from the residence owner, manager or administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, in order to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data, please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases, a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard space: A space where the resident does not receive high-level care (that is, the resident receives less than 1.5 hours of care per day) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy care space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples of conditions that could require high-level care include Alzheimer's, dementia and reduced mobility.

Respite space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or subsidy space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: The actual amount a resident pays per month for his or her accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the co-operation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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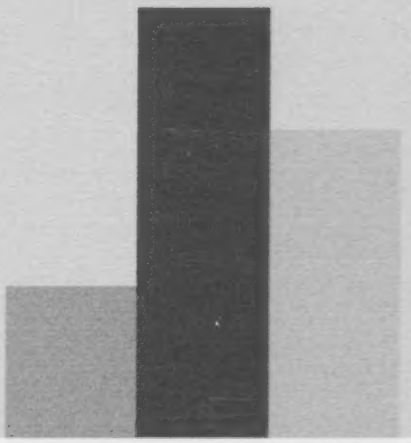

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